MyTax Illinois Help

General use information

Install Adobe Reader

You are not required to install any software.

However, you do have the option of viewing letters sent to you from the agency, as well as to print copies of your returns. If you wish to view these letters or print returns, you will need to have Adobe Reader installed on your computer. Click here to download the latest version of Adobe Reader.

Related items: Which browsers can I use? How do I determine which browser I am using? How do I change my browser font size? How do I enable pop-ups in my browser?

Enable Pop-ups in My Browser

Some actions require pop-ups to be enabled in your browser. For example, viewing letters or printing a return will require a new browser window to open. Clicking the Help hyperlink also opens a new browser window. To allow pop-ups, locate your browser in the list below and follow the instructions.

INTERNET EXPLORER

Select the Tools menu and click Internet Options. Select the Privacy tab. In the Pop-up Blocker section, click Settings. In the Address of website to allow field, type the URL for the website, then click Add.

FIREFOX

Click the Firefox menu button in the upper-left corner of Firefox and select Options from the menu. Click the Content button, then click the Exceptions… button next to the Block pop-up windows check box. In the Address of web site field, type the URL for the website, then click Allow.

CHROME

To the right of your browser's address bar, select the Wrench and select Options from the menu. Click the Under the Hood tab and select the Content Settings button. In the Pop-ups section of the list, click the Manage Exceptions button. In the available field, type the URL for the website and make sure the drop-down menu to the right shows Allow, then press Enter on your keyboard.

Related items: Which browsers can I use? How do I determine which browser I am using? How do I change my browser font size? How do I install Adobe Reader?

Determine Your Current Browser

To determine which browser you are currently using, click **Help** in the browser toolbar. You will see a menu option that starts with "About..." Click this menu option. You will generally see the type and version of browser here.

Related items: Which browsers can I use? How do I change my browser font size? How do I install Adobe Reader? How do I enable pop-ups in my browser?

Change Browser Font Size

In some browsers, you may be able to change the font size on your screen. If your browser supports this functionality, you can press and hold down the **Ctrl** key and then use the scroll wheel on your mouse to adjust the font size on your screen.

Related items: Which browsers can I use? How do I install Adobe Reader? How do I enable pop-ups in my browser? How do I determine which browser I am using?

Browsers that You Can Use

You can use the following browsers to access the web site:

- Internet Explorer 7.0 and higher
- Firefox 3.0 and higher
- Chrome 11.0 and higher
- Safari 4.0 and higher
- Opera 10.0 and higher.

Note: Netscape is not supported.

These are the minimum browser versions necessary to support all of the features and functions. If you need to upgrade your browser, please go to the appropriate browser web site to download the latest version.

Related items: How do I change my browser font size? How do I install Adobe Reader? How do I enable pop-ups in my browser? How do I determine which browser I am using?

Field Color Descriptions

In a window, each field has a background color. That color provides important information regarding what you can (or cannot) enter into that field.

Color	Meaning	Description
White	Default	The field is in inquiry or view-only mode and does not currently accept data entry. Examples of view-only fields could be: • A *fixed value* that can only be assigned by the system, such as an *Account ID*. • The field is calculated from other fields and you cannot directly change the value in the field. Edits may be made in one or all of the fields that comprise the calculation. • In an existing record, a value that is not currently editable. However, certain non-editable fields can become editable when you click the **Change** button in the menu bar on the left side of the window (or other buttons that enable modification to individual fields).
Red	Error	The information entered in this field does not meet a requirement and so the field is in error. **Note:** When you move your cursor over a field in-error, TipText is displayed that provides a short message describing the error condition.
Yellow	Required	The field is mandatory. You **must** enter a value in this field before you can save the record. If yellow fields are not completed, the record will not save.
Green	User-enabled	The field is optional. You may enter a value in this field, but it is not mandatory. Green fields do not require completion in order to save the record.

Related items: Use the menu bar Use tabs in section headers Use keyboard shortcuts Sort lists using column headings

Filter Lists

Some lists can be filtered to narrow down the information displayed in the list. If you see the word **Filter** in a section title bar, then you can filter that list.

To filter a list, click the Filter hyperlink in the section title bar. A green filter field is displayed at the top of the list. To narrow down the contents of the list, type a word or a portion of a word into the filter field and press the **Enter** key on your keyboard. The list only displays rows containing the word or portion of a word that you typed.

To remove the filter from the list and display all of the list items, either click the close button at the right end of the filter field or delete the contents of the filter field and press **Enter** on your keyboard again.

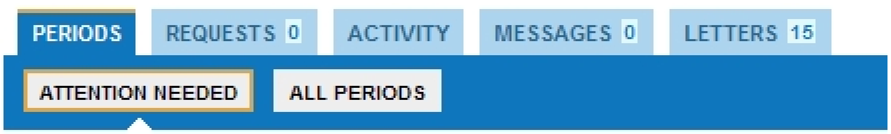
Related items: [Understand field colors]() [Use tabs in section headers]() [Use keyboard shortcuts]() [Sort lists using column headings]()

Use Tabs in Section Headers

Some sections contain headers that offer multiple viewing options.

When you see a header that has multiple labels, each of those labels is a tab. Each tab can have one or more sub-tabs. When you click a tab or sub-tab, the section displays information described by the tab label.

For example, you may see a section header that looks like the following:



In this example, the section is showing *periods* that *need attention*, as indicated by the **Periods** tab and the **Attention Needed** sub-tab that are currently selected. You can click any of the other sub-tabs to view the information described or any of the other tabs to view a different set of sub-tabs. For example, you can click the **Messages** tab to see messages awaiting your attention.

Use the Menu Bar

The menu bar is displayed on the left side of the window. It contains options that help you navigate and perform actions. To select an option from the menu, click the appropriate [hyperlink]().

You will likely see some of the following options in the top portion of the menu bar, labeled **Menu**:

- **Home** - Click to return to the main screen.
- **Back** - Click to return to the last window you viewed.
- **Log Off** - Click to log off.

Additional options in the menu depend on which window you are currently viewing.

Related items: [Use tabs in section headers]() [Use keyboard shortcuts]() [Sort lists using column headings]()

Use Keyboard Shortcuts

If you prefer to use the keyboard rather than the mouse, there are several keyboard shortcuts that are available.

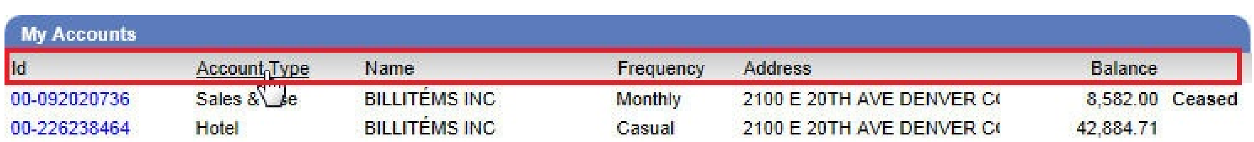
Shortcut	Result
Tab key	Move forward from the current field to the next one in the window.
Shift + **Tab**	Move to the previous field in the window.
Enter the first letter	When you are selecting an item from a drop-down menu, type the first letter of the item you want. When you do this, MyTax Illinois automatically selects the first entry in the menu that begins with that letter. (Press the down arrow key to move to any subsequent entries that begin with that letter.)
Alt + left-arrow key	Returns you to the last window you visited. You can press this key combination multiple times to move several windows back through the sequence of windows you have visited. (This key combination performs the same action as the **Back** option in the menu bar.)

Related items: Use the menu bar Use tabs in section headers Sort lists using column headings

Sort Lists Using Column Headings

Certain sections organize lists beneath distinct column headers. The area outlined in red in the image below shows an example of this type of column header. Lists containing this type of column header can be sorted and arranged to aid you in organizing the list information in a useful way.

To sort the items in a list in alphanumerical order by a particular column, click that column header name.



Related items: Use keyboard shortcuts Use the menu bar Use tabs in section headers

Use the I Want To... Menu

The **I want to**... menu is displayed on the left navigation column of most windows.

The options in this menu describe actions you would most likely want to perform from the current window.

These options change depending on which window you are on.

To select an option from the menu, click the appropriate hyperlink.

If the action you wish to perform is not listed in the **I want to**... menu, you can navigate to another logical window and view the **I want to**... menu there or you can search the online help.

Related items: Use the action bar? Use the breadcrumb trail? Understand field colors Use tabs in section headers Use keyboard shortcuts

Account Details

This window shows you a summary of your account. The balance of your account is shown in the top left section of the window.

ACCOUNT SUMMARY

This section shows the account ID, filing frequency, and balance of the account being viewed.

- Click the **Setup** hyperlink to set up a payment source for this tax account.
- Click the **Edit** hyperlink next to the **Payment Source** label to make changes to an existing payment source for this tax account.
- Click the **Pay** hyperlink to make a payment on this tax account.

NAMES AND ADDRESSES

This section shows all taxpayer names and addresses on file for this account.

PERIODS TAB (also called Returns for ST-556 accounts)

This tab displays period information for the account.

ATTENTION NEEDED SUB-TAB

This tab displays a list of periods needing attention. The **Messages** column indicates the filing status for the period.

- Click the **File Now** hyperlink to file a return for the period.
- Click the **View/Amend** hyperlink to view or amend an existing return for a period.
- Click the **Pay** hyperlink to make a payment for a period.

ALL PERIODS SUB-TAB (also called All Returns for ST-556 accounts)

This tab displays periods for the tax account. You can click the **Change Date** hyperlink to enter in a specific date from which to display periods. After entering in a date, click the **OK** button. All periods including and later than the date specified are displayed. To return to the default list of periods, click the **Defaults** hyperlink.

REQUESTS TAB

Use the sub-tabs in this tab to view requests waiting to be processed and to search for requests by various criteria. You can use the hyperlinks in the title bar to specify a date or confirmation number to search by. Click the **Defaults** hyperlink to re-display the default information for the tab.

Click the title hyperlink for a request to view its details.

ACTIVITY TAB

This tab displays all requests that have been passed to the department and, if processed, any changes the department made. This tab will display all actions on your IDOR account, even if those activities were initiated outside of the MyTax Illinois system. The “status” column in this tab will be a helpful tool in determining whether your return has been fully processed by the department. **Note:** The department transfers certain requests only once a day, so most requests do not occur immediately. These requests are considered pending at the time they are made (e.g. payments you have scheduled for the future or actions that have not been transferred to the department) and will not show in the “activity” tab until the daily retrieval is done by the department or the date of payment.

MESSAGES TAB

This tab displays notices related to the account regarding actions that have been or need to be taken.

The **Inbox** tab displays notices posted to your account from the agency. To view the details of a notice, click the subject hyperlink. A check mark in the **Read** column indicates that you have viewed the details of the notice.

LETTERS TAB

This tab will contain copies of correspondence mailed to you by IDOR.

Click the **Letter ID** hyperlink for a particular letter to view a copy of the letter.

Related items: File a return? Make a payment? View the status of a payment? View the status of a return? View the details of an existing return? Amend a return?

Access and logon information

Sign up for a MyTax Illinois Account

WHAT DO I DO?

1. Click **Sign up Now**! (Click here for more information about creating a MyTax Illinois Account.)
2. Complete the appropriate fields.
3. Click **Submit**. A confirmation message is displayed.
4. Review the **Activation Summary**. Click **Yes** to confirm that you would like to submit the request.
   Note: If you are not sure or need to go back and make changes to the Activation information, click **No** in the confirmation message or click **Previous** in the left navigation menu.
5. Once confirmed, the activation is saved and an information window opens displaying your confirmation number. An authorization code will be sent to your email address. Click **Okay** to continue.

Related items: Log on? Log off? Reset my password? Add access to another tax account?

Password Rules

Passwords must follow these rules:

- Minimum 8 characters, no more than 30
- Passwords must contain both letters and numbers
- Passwords must be mixed case

Related items: Change my password? Reset a forgotten password? Change my security question? Change the answer to my security question?

Understanding Logons

A logon is the combination of username and password that a user enters to log on to work with his or her tax accounts.

One taxpayer entity may have multiple logons. For example, if several employees of an organization need to access a company's tax accounts, each employee will have his or her own unique logon.

An organization may also allow non-employees, such as accountants, tax preparers, or payroll service providers, to access the organization's tax accounts. These non-employees would each have their own unique logon. Non-employee logons for a taxpayer are called third-party logons. Click here to learn more about third-party logons.

When you first register, your logon is created. The first user for a company or organization that registers is given the access type of Master. (Only one logon for a taxpayer can have the Master access type.) The logon designated as Master can control access for all other logons created for the taxpayer, as well as authorize any third-party access.

Related items: Add a new logon? Add a third-party access logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow additional logons? Allow/disallow third-party logons? Set default access levels for new logons?

Log On

WHAT DO I DO?

1. In the Login section, enter your username and password into the appropriate fields.
   Note: If this is your first time logging in or your first time logging in with your new password, enter the authorization code in the **Authorization Code** field. You should have received your code by email.
2. Click the **Login** button.

Related items: Reset my password? Sign up for a MyTax Illinois account? Log off?

Manage Logons

Use this window to manage the logons for your web profile.

MY ACCESS LEVEL

New Logons Allowed: Select this check box if new logons are allowed to be added.

Third Party Logons Allowed: Select this box if users other than the taxpayer are allowed to logon to this taxpayer's record.

Default Access Level for New Logons: Use the drop-down arrow to select the default access for new logons created.

Default Access Level for Third Party Logons: Use the drop-down arrow to select the default access for third party logons.

*Click the **Change** hyperlink in the menu bar on the left side of the window to make changes to the information in this panel.*

LOGONS TAB

This tab lists the current web logons for this taxpayer. Click the web logon name hyperlink to edit the details for the web logon.

*Click the **Add Web Logon** hyperlink in the menu bar on the left side of the window to add another logon for this taxpayer.*

THIRD PARTY WEB LOGONS

This panel lists the current third party web logons for this taxpayer. Click the third party web logon name hyperlink to edit the details for the web logon.

Understanding Third-Party Logons

An organization may allow non-employees, such as accountants, tax preparers, or payroll service providers, to access the organization's tax accounts. These non-employees would each have their own unique logon. Non-employee logons for a taxpayer are called *third-party* logons.

HOW DOES IT WORK?

You must specifically allow third-party logons on your accounts. Click here for instructions on how to allow third-party access. A third party will use his or her own unique logon and will be able to view all accounts to which he or she has access via the single logon.

WHAT LEVELS OF ACCESS CAN THIRD PARTIES HAVE?

The Master logon has complete control over the level of access a third party has to your tax accounts. Each account has an independent access level that can be set for each third-party logon. The following access can be granted for third-party logons:

- File – Allowed to view account information and file returns
- Pay – Allowed to view account information and make payments
- File & Pay – Allowed to view account information, file returns, and make payments
- View – Only allowed to view account information

- Full Access – Allowed the same access as the Master logon, with the exception of managing the web profile of the Master account

WILL I KNOW IF SOMEONE GAINS ACCESS TO MY ACCOUNTS?

Yes. A message will be sent to the Master account anytime a change is made to your third party settings or if a third party adds access to your account(s).

Related items: Add a new logon? Add a third-party access logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow additional logons? Allow/disallow third-party logons? Set default access levels for new logons?

Allow/Disallow Third-Party Logons

Third-party logons can be created to allow persons you designate to have access to your accounts. Third-party logons are typically used for tax preparers, accountants, etc.

You can change whether you want to allow or disallow third-party logons at any time. Note that this setting does not affect logons that have already been created.

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. Click the **Manage Logons** tab.
2. If it is not displayed by default, select the **Settings** sub-tab.

Note: If you do not see the **Settings** sub-tab, then you do not have permissions to allow or disallow third-party logons.

If **Third-Party Logons Allowed** is set to **Yes**, third-party logons can be created. If it is set to **No**, they cannot be created. Click the **Yes** or **No** hyperlink to toggle between the two options.

Related items: Understand logons? Add a new logon? Add a third-party access logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow additional logons? Set default access levels for new logons?

Allow/Disallow Additional Logons

Additional logons can be created to allow persons you designate to have access to your accounts. Additional logons are usually created for members of your company or organization who are involved in viewing, filing, or paying taxes for your organization.

You can change whether you want to allow or disallow the creation of additional logons at any time. Note that this setting does not affect logons that have already been created.

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

3. Click the **Manage Logons** tab.
4. If it is not displayed by default, select the **Settings** sub-tab.

Note: If you do not see the **Settings** sub-tab, then you do not have permissions to allow or disallow additional logons.

If **New Logons Allowed** is set to **Yes**, other logons for this taxpayer can be created. If it is set to **No**, new logons cannot be created. Click the **Yes** or **No** hyperlink to toggle between the two options.

Related items: Understand logons? Add a new logon? Add a third-party access logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow third-party logons? Set default access levels for new logons?

Set Default Access Levels for New Logons

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. Click the **Manage Logons** tab. This tab shows the rules that apply to all additional logons that are created for the taxpayer.
2. If it is not displayed by default, select the **Settings** sub-tab. (Note: If you do not see the **Settings** sub-tab, then you do not have permissions to set default access levels for new logons.)
3. You set default access levels for new logons and for third-party logons the same way. Click the hyperlink next to either of these items.
4. A **Change Default** window opens.
5. Click the blue drop-down arrow in the **Default** field to select a new default access level. **Note:** The access level for a specific logon can be changed at any time by the designated Master logon.
    a. File - Allows the logon to view information and file returns
    b. File & Pay - Allows the logon to view information, file returns, set up payment sources, and make payments
    c. Pay - Allows the logon to view information, set up payment sources, and make payments
    d. View - Allows the logon to view the taxpayer information only. A logon with this access level cannot make any changes
    e. Full Access – Allowed the same access as the Master logon, with the exception of managing the web profile of the Master account
6. Click **Save**.

Related items: Understand logons? Add a new logon? Add a third-party access logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow additional logons? Allow/disallow third-party logons?

Add a New Logon

There are two ways to create logons: 1) Activate using the standard authentication process; or 2) Create additional logons using the logon management tools accessible by the Master logon. This topic describes how to use the logon management tools. Click here to learn more about adding another logon using the standard authentication process.

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. Under the **I want to** heading, click the **Manage Logons** tab.
2. Click the **Logons** sub-tab.
3. Click the **Add Logon** hyperlink in the **Logons** title bar beneath the tabs.
4. Complete the appropriate fields in the window.
5. Click **Submit**. A confirmation message window is displayed.
6. An authorization code will be sent for the logon via e-mail. The logon will need this authorization code for the first logon.

Related items: Understand logons? Add a third-party access logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow additional logons? Allow/disallow third-party logons? Set default access levels for new logons?

Add a Third-Party Access Logon

An organization may allow non-employees, such as accountants, tax preparers, or payroll service providers, to access the organization's tax accounts. These non-employees would each have their own unique logon to MyTax Illinois. Non-employee logons for a taxpayer are called *third-party* logons.

In order to create a third-party logon, the taxpayer must first enable third-party logons to be created. Click here for information on allowing third-party logons. Then, the **third-party** must use the following steps to complete the process.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click **Add Access to Another Account** in the menu bar on the left side of the window.
2. Complete the appropriate fields in the window.
3. Click **Submit**. A confirmation message window is displayed.
4. An authorization code will be sent for the logon via e-mail. The logon will need this authorization code for the first logon.

Related items: Understand logons? Add a new logon? Change the access type or active status of a logon? Change the access level of a logon? Allow/disallow additional logons? Allow/disallow third-party logons? Set default access levels for new logons?

Access Level Account Detail

Use this window to edit the access levels for a web logon.

LOGON DETAILS

Name: This field displays the taxpayer name.

Web Logon: This field displays the web logon for which you are editing details.

Active: A check mark in this box indicates the web logon is currently active.

Access Type: This field displays the access type for this logon.

*Click the **Change** hyperlink in the menu bar on the left side of the window to make changes to the information in this panel.*

ACCOUNTS FOR THE WEB LOGON

This panel lists the accounts for which this web logon has access. To edit the access level for an account, click the account ID hyperlink for that account.

Change the Access Level of a Logon

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. Click the **Manage Logons** tab.
2. Click the **Access to My Accounts** sub-tab.
3. Click the hyperlink in the **Access Level** column for the logon whose access level you want to change. An **Edit Access Level** window is displayed.
    a. To change the access level, click the blue drop-down arrow in the **Access Level** field. Select the new access level:
        i. File - Allows the logon to view information and file returns.

   ii. File & Pay - Allows the logon to view, file returns, set up payment sources, and make payments.
   iii. Pay - Allows the logon to view, set up payment sources, and make payments.
   iv. View - Allows the logon to view the taxpayer information only. A logon with this access level cannot make any changes.
   v. Full Access – Allowed the same access as the Master logon, with the exception of managing the web profile of the Master account
  b. To inactivate a logon, click in the **Active** check box to remove the check mark.
  c. To activate a logon, click in the **Active** check box to add a check mark.
4. Click **Save**.

Related items: Understand logons? Add a new logon? Add a third-party access logon? Change the access type or active status of a logon? Allow/disallow additional logons? Allow/disallow third-party logons? Set default access levels for new logons?

Change the Access Type or Active Status of a Logon

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. Click the **Manage Logons** tab.
2. Click the **Logons** sub-tab.
3. Click the **Active** or **Inactive** hyperlink for the logon you want to change. An **Edit Access Type** window opens.
4. Edit the access type or active/inactive status, as necessary.
5. Click Save.

Related items: Understand logons? Add a new logon? Add a third-party access logon? Change the access level of a logon? Allow/disallow additional logons? Allow/disallow third-party logons? Set default access levels for new logons?

Add Access to Another Account

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Add Access to Another Account**

WHAT DO I DO?

1. Complete the appropriate fields as necessary.
2. Click **Submit**.
3. A confirmation message is displayed. Click **Yes** to submit the request.
4. Once submitted, the activation is saved and an information window opens displaying your confirmation number. The request should be processed momentarily. A confirmation email will be sent to you when the request has been processed. Click **Okay** in the menu bar on the left side of the window to continue.

Related items: Add a new logon?

Reset a Forgotten Password

If you forget your password, you can reset your password yourself.

However, it is important that the password reset process be completed in one sitting. If, for some reason, your session times out while resetting your password, you will be unable to logon. You will need to call the agency and request to have your account unlocked.

WHAT DO I DO?

1. On the **Logon** window, click **Forgot my Password**.
2. Enter your username in the **Username** field.
3. Click the **Next** button.
4. Enter the answer to your secret question.
5. Enter your new password in the **New Password** field.
6. Enter your new password again in the **Repeat Password** field.
7. Click **Submit**. An authorization code will be sent to your email address. This code is required in order to login with your new password.

Related items: Change my password? View password rules? Change my security question? Change the answer to my security question?

Change My Password

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click **Change Password**.
2. In the **Current Password** field, type your current password.
3. Type your new password in the **New Password** field.
4. Type your new password again in the **Confirm Password** field.
5. Click the **Reset** button.
   Note: Your new password is active immediately. The next time you are requested to enter your password to perform an action you will need to use your new password.

Related items: Reset a forgotten password? View password rules? Change my security question? Change the answer to my security question?

Log Off

Logging off takes you back to the home screen where you can login again, if necessary, or perform other tasks.

WHAT DO I DO?

You can log off by clicking the **Log Off** hyperlink in the menu bar on the left side of the window.

Related items: Add access to another tax account?

Cancel My Online Access

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click **Cancel My Online Access**.
2. Enter your password into the **Password** field to confirm that you wish to cancel your online access.
3. Click **OK**.
   Note: By cancelling your online access, you will no longer be able to access your accounts online.

Related items: Log off?

Reactivate Online Access

You cannot reactivate a logon name that has been cancelled. However, you can create a new logon name and password to access your accounts.

Related items: Sign up for a MyTax Illinois account?

Security information

Change My Security Question

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click **Update Profile**.
2. Click the drop-down arrow in the **New Question** field and select your new security question from the drop-down menu.
3. Type a new answer in the **Answer** field. (Note that the answer is not case-sensitive.)
4. Confirm the answer by typing it again in the **Confirm** field.
5. Click **Save**.
6. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

Related items: Change my password? Reset a forgotten password? View password rules? Change the answer to my security question? Change my web name? Change my email address? Change my telephone number?

Change the Answer to My Security Question

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click **Update Profile**.
2. Type a new answer in the **Answer** field. (Note that the answer is not case-sensitive.)
3. Confirm the answer by typing it again in the **Confirm** field.
4. Click **Save**.
5. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

Related items: Change my password? Reset a forgotten password? View password rules? Change my security question? Change my web name? Change my email address? Change my telephone number?

Contact information

Update Contacts at the Taxpayer Level

You can update contacts at the taxpayer level that will apply to all of your tax accounts.

The following steps describe how to update contacts *at the taxpayer level*.

Click here to see the steps for updating contacts *for a specific tax account*.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Update Contacts**

WHAT DO I DO?

1. After you click **Update Contacts** in the menu bar on the left side of the window, the **Edit Contacts** window opens.

2. To **Add a Contact**, click the **Add a Contact** hyperlink.
    a. The **New Contact** sub-tab opens.
    b. Complete the appropriate fields as necessary.
3. To **Edit a Contact**, click the hyperlink associated with the contact you want to edit.
    a. The **Contact Information** is displayed.
    b. Edit the fields as necessary.
4. To **Delete a Contact**, click the hyperlink associated with the contact you want to delete.
    a. Click **Delete this Contact**.
    b. Click **Yes**.
5. If you click the **Edit Contacts** sub-tab, you can see your updated contact information.
6. Once you have completed updating your contacts, click **Submit**.
7. An authorization window opens requiring you to enter your password to authorize the change. Enter your password in the **Password** field, then click **OK**.
8. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
9. You can view your requests by clicking the **Requests** tab and then clicking the **Waiting to be Processed** sub-tab.

Related items: Update contacts for a specific tax account? Update responsible parties?

Update Contacts for a Specific Tax Account

You can update contacts at the tax account level that will apply only to that particular tax account.

The following steps describe how to update contacts *for a specific tax account*.

Click here to see the steps for updating contacts *at the taxpayer level*.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.

2. Click the account ID hyperlink for the account for which you would like to update your contacts.
3. Click **Update Contacts** in the menu bar on the left side of the window, opening the **Edit Contacts** window.
4. To **Add a Contact**, click the **Add a Contact** hyperlink.
    a. The **New Contact** sub-tab opens.
    b. Complete the appropriate fields as necessary.
5. To **Edit a Contact**, click the hyperlink associated with the contact you want to edit.
    a. The **Contact Information** is displayed.
    b. Edit the fields as necessary.
6. To **Delete a Contact**, click the hyperlink associated with the contact you want to delete.
    a. Click **Delete this Contact**.
    b. Click **Yes**.
7. If you click the **Edit Contacts** sub-tab, you can see your updated contact information.
8. Once you have completed updating your contacts, click **Submit**.
9. An authorization window opens requiring you to enter your password to authorize the change. Enter your password in the **Password** field, then click **OK**.
10. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
11. You can view your requests by clicking the **Requests** tab and then clicking the **Waiting to be Processed** sub-tab.

Related items: Update contacts at the taxpayer level? Update responsible parties?

Update Responsible Parties

You can update the responsible parties at the tax account level that will apply only to that particular tax account.

The following steps describe how to update contacts *for a specific tax account*.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account for which you would like to update your responsible parties.
3. Click **Update Responsible Parties** in the menu bar on the left side of the window, opening the **Responsible Parties** window.
4. To **Add a Responsible Party**, click the **Add a Responsible Party** hyperlink.
    a. The **New Responsible Party** sub-tab opens.
    b. Complete the appropriate fields as necessary.
5. To **Inactivate a Responsible Party**, click the **Cease** hyperlink associated with the responsible party you want to inactivate.
    a. The **Cease Date** field will be automatically populated with today's date.
    b. You must have at least one active responsible party before inactivating any.
6. If you click the **Responsible Parties** sub-tab, you can see your updated responsible party information.
7. Once you have completed updating your responsible parties, click **Submit**.
8. An authorization window opens requiring you to enter your password to authorize the change. Enter your password in the **Password** field, then click **OK**.
9. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
10. You can view your requests by clicking the **Requests** tab and then clicking the **Waiting to be Processed** sub-tab.

Related items: Update contacts at the taxpayer level? Update contacts for a specific tax account?

Change My Telephone Number(s)

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click the **Update Profile** hyperlink.
2. Type your new number(s) in the **Phone 1** or **Phone 2** field.
3. Click **Confirm**.

4. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

Related items: Change my web name? Change my email address? Change my security question? Change the answer to my security question? Change my password?

Change My Email Address

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click the **Update Profile** hyperlink.
2. In the **Email** field, type your new email address.
3. Click **Confirm**.
4. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

Related items: Change my web name? Change my telephone number? Change my security question? Change the answer to my security question? Change my password?

Change My Web Name

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. In the **I want to** section, click the **Update Profile** hyperlink.
2. In the **Web Name** field, type your new web name.
3. Click **Confirm**.
4. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

Related items: Change my email address? Change my telephone number? Change my security question? Change the answer to my security question? Change my password?

Profile

You can use this window to view your web profile information.

Use the hyperlinks in the **I want to**... panel in the upper right corner of the window to edit your web profile information.

WEB PROFILE

This panel shows your taxpayer name, phone number(s), email address, and secret question.

- To edit the information in this panel, click the **Update Profile** hyperlink in the **I want to**... panel.

MY ACCOUNTS TAB

Use this tab to manage payment sources for your accounts.

ACCOUNT PAYMENT SOURCES SUB-TAB

This tab lists the accounts you can access from the web as well as the payment sources on file for each account.

- To view or edit the details of an existing payment source, in the **Payment Source** column, click the source name hyperlink.
- To add another payment source, in the **Payment Source** column, click the **Setup** hyperlink.

ADVANCED PAYMENT OPTIONS SUB-TAB

Use this tab to set up additional payment options.

MANAGE LOGONS TAB

Use this tab to manage the logons for your web account.

LOGONS SUB-TAB

This tab lists all existing log on IDs for your web account.

You can click the **Add Logon** hyperlink in the title bar to add a new logon for your web account.

ACCESS TO MY ACCOUNTS SUB-TAB

This tab lists the access levels for each logon ID associated with this customer.

Related items: Change my web name? Change my phone number? Change my email address? Change my security question? Change the answer to my security question? Add access to another tax account? Cancel my online access? Change my password?

Communication from the Department

View Messages

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click the **Messages** tab.
2. You can view messages the agency has sent to you:
    a. To view a list of messages sent from the agency to you, view the **Inbox** or **Unread** sub-tab. To view the details of a message, click the hyperlink in the **Subject** column.

Related items: Delete a message?

Delete a Message

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click the **Messages** tab.
2. Click the **Inbox** or **Unread** sub-tab.
3. In the far right column, click the **Delete** hyperlink for the notice you wish to delete.

Related items: View messages?

View Letters

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click the **Letters** tab.
2. Click the letter ID hyperlink for the letter you wish to view.

Related items: Troubleshoot viewing letters?

Troubleshoot viewing letters

If you are unable to view letters, please check the following:

- Adobe Reader is installed on your computer. Click here to download the latest version of Adobe Reader.
- Pop-ups are enabled in your browser. Click here to learn more about enabling pop-ups.

Related items: View letters?

Information about web requests

Understanding Requests

Anytime you make a change or perform an action on your account, it is recorded as a *request*. This request will be processed by the tax system at various intervals throughout the day. Filing a return, making a payment, adding access to another account, and updating your web profile are all examples of requests.

Related items: Search for a request? View the details of a request? Withdraw a pending request?

Request List

This window shows you a list of the requests made for the selected tax account.

- To search for a particular request, you can enter the confirmation number in the **Confirmation Number** field and click the **Search** button.

REQUESTS THAT REQUIRE YOUR ATTENTION

This panel shows requests on which you need to take some action. (Note that if there are not requests requiring action on your part, this panel is not displayed.)

- To view further details or take action on a request, click the request name hyperlink (in the **Title** column).

REQUESTS WAITING TO BE PROCESSED

The top panel shows you a list of requests that are still pending processing.

- To add another request, click the **Add Request** hyperlink in the far right of the panel title bar.

REQUESTS THAT HAVE BEEN PROCESSED

The lower panel shows you requests that have been processed recently.

- Click the hyperlinks in the far right of the panel title bar to change the number of days for which you are viewing requests.

Related items: View the status of a return? View the status of a payment? View the details of a request? Withdraw a pending request? Search for a request?

Search for a Request

WHERE DO I START?

Depending on which window you are already on, you may need to click one or more of the following hyperlinks in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click the **Requests** tab.
2. If it is not already selected, click the **All Requests** sub-tab.
3. Depending on how you want to search for the request, you can:
    a. Click the **Change Date** hyperlink in the tab title bar. Enter the earliest date from which you wish to search, then click the **OK** button. Click the title hyperlink for the request you wish to view. Or
    b. Click the **Confirmation Number** hyperlink in the tab title bar. Enter the exact confirmation number of the request you wish to view, then click **OK**. The request is displayed.

Related items: View the details of a request? Withdraw a pending request? Withdraw a pending return request?

View the Details of a Request

WHERE DO I START?

Depending on which window you are already on, you may need to click one or more of the following hyperlinks in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click the **Requests** tab.
2. Depending on whether you wish to view a pending request or a processed request, you can:
    a. Click the **Waiting to be Processed** or **Started but not filed** sub-tab. In the **Title** column, click the hyperlink for the request to view more details.
    b. Click the **All Requests** sub-tab to search for the request. On the **All Requests** sub-tab select the hyperlink in the tab title bar that best describes the type of search you want to conduct.

Related items: Withdraw a pending request? Search for a request? Withdraw a pending return request?

Withdraw a Pending Request

WHERE DO I START?

Depending on which window you are already on, you may need to click one or more of the following hyperlinks menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. Click the **Requests** tab.
2. Click the **Started but not filed** sub-tab.
3. Click the title hyperlink for the request you want to withdraw.
4. Click **Withdraw**.
5. Click **Confirm** to confirm that you want to withdraw the request.

Related items: View the details of a request? Search for a request? Withdraw a pending return request?

Account and Site maintenance

Maintain Locations for ST-1, ST-4, ST-556, ST-14, and CMFT-1 tax accounts

You can add and cease site for sales and use taxes, automobile rental tax, hotel tax, and telecommunications tax.

Adding and ceasing sites for sales and use taxes is done at the ST-1 tax account level. Site applicability for ST-4, ST-556, and CMFT-1 tax types can be edited for each site.

NOTE: ST-14 tax accounts require at least one *Chicago* site at the ST-1 tax account level. These sites are automatically applicable for ST-14 tax.

The following steps describe how to add and cease sites for sales and use tax accounts.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the ST-1 account for which you would like to add or cease sites.
3. Click **Maintain Locations** in the menu bar on the left side of the window, opening the **Site Maintenance** window.
4. To **Add Permanent Sites**, click **Add Permanent Sites** at the top of the screen.
    a. The **Add Sites** sub-tab opens.
    b. Click **Add a Site**.
    c. Complete the appropriate fields, including applicability for ST-4, ST-556, and CMFT-1, as necessary.
5. To **Add Changing Location Sites**, click **Add Changing Location Sites** at the top of the screen.
    a. Check the box in the **Select** column to add sites listed in the tables.
    b. Edit the fields as necessary.
6. To **Make a Change to an Existing Site**, click the **Location Code** hyperlink associated with the site for which you want to make a change.

    a. Correcting site information for existing sites is limited to ceasing the site and adding or ceasing sub-tax account applicability.
    b. Edit the fields as necessary.
7. Once you have completed updating your sites, click **Submit**.
8. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
9. **Maintain Location** requests will be effective on your account as soon as the request is processed – usually within 5-10 minutes.

Related items: Maintain locations for ART-1 and RHM-1 tax accounts? Maintain locations for RT-2 tax accounts?

Maintain Locations for ART-1 and RHM-1 tax accounts

You can add and cease site for sales and use taxes, automobile rental tax, hotel tax, and telecommunications tax.

The following steps describe how to add and cease sites *for automobile rental tax and hotel tax accounts*.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account for which you would like to add or cease sites.
3. Click **Maintain Locations** in the menu bar on the left side of the window, opening the **Site Maintenance** window.
4. Click **Add Permanent Sites** at the top of the screen.
    a. The **Add Sites** sub-tab opens.
    b. Click **Add a Site**.
    c. Complete the appropriate fields as necessary.
5. To **Make a Change to an Existing Site**, click the **Location Code** hyperlink associated with the site for which you want to make a change.
    a. Correcting site information for existing sites is limited to ceasing the site.
    b. Edit the fields as necessary.

6. Once you have completed updating your sites, click **Submit**.
7. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
8. **Maintain Location** requests will be effective on your account as soon as the request is processed – usually within 5-10 minutes.

Related items: Maintain locations for ST-1, ST-4, ST-556, ST-14, and CMFT-1 tax accounts? Maintain locations for RT-2 tax accounts?

Maintain Locations for RT-2 tax accounts

You can add and cease site for sales and use taxes, automobile rental tax, hotel tax, and telecommunications tax.

The following steps describe how to add and cease sites *for telecommunications tax accounts*.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account for which you would like to add or cease sites.
3. Click **Maintain Locations** in the menu bar on the left side of the window, opening the **Site Maintenance** window.
4. Click **Add Telecom Sites** at the top of the screen.
    a. Check the box in the **Select** column to add sites listed in the tables.
    a. Edit the fields as necessary.
5. To **Make a Change to an Existing Site**, click the **Location Code** hyperlink associated with the site for which you want to make a change.
    a. Correcting site information for existing sites is limited to ceasing the site.
    b. Edit the fields as necessary.
6. Once you have completed updating your sites, click **Submit**.
7. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.

8. **Maintain Location** requests will be effective on your account as soon as the request is processed – usually within 5-10 minutes.

Related items: Maintain locations for ST-1, ST-4, ST-556, ST-14, and CMFT-1 tax accounts? Maintain locations for ART-1 and RHM-1 tax accounts?

Request to close an account

You can request to close a tax account if you no longer need to file and pay that particular tax.

The following steps describe how to add and cease sites *for telecommunications tax accounts*.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account you would like to close.
3. Click **Request to Close Account** in the menu bar on the left side of the window, opening the **Close Account** window.
4. Enter the **Closure Date** and **Closure Reason**.
   NOTE: If you have any open periods, you will see the **Open Periods** tab. Your account will not be closed until the return status for each open period displays "completed."
5. Once you have completed updating your sites, click **Submit**.
6. A confirmation window shows you the details of your request and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
7. You can view your requests by clicking the **Requests** tab and then clicking the **Waiting to be Processed** sub-tab.

Information about payments

Make a Payment

You can make a single payment or multiple payments.

The following steps describe how to *make a payment on a single return, period, audit, etc.*

Click here to see the steps for making payments on multiple periods, returns, audits, etc.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account for which you would like to add a payment.
3. On the **Periods** tab, either click the **Attention Needed** sub-tab or click the **All Periods** sub-tab and search for the period for which you would like to make a payment.
4. Click the **Pay** hyperlink for the period on which you want to make a payment.
5. Click the hyperlink that best describes the type of payment you want to make.
6. The **Schedule a Payment** window opens.
   a. *If you already have bank account information on file*, the default bank account for the selected tax account is displayed.
      i. To choose another bank account on file, click **Choose existing bank account**.
      ii. To manually enter in new bank account information, click **New payment source**.
   b. *If you do not have bank account information on file*, enter in your bank account information.
7. Be sure to enter the payment amount in the **Payment Amount** field.
8. Click **Submit**.
9. An authorization window opens requiring you to authorize the payment transaction. Enter your password in the **Password** field, then click **OK**.

10. A confirmation window shows you the details of your payment and your confirmation number. Click **Okay** to close the confirmation window.
11. You can view your payment requests by clicking the **Requests** tab and then clicking the **Waiting to be Processed** sub-tab.

Related items: View the status of a payment? Make multiple payments? Cancel a pending payment? Add a payment source for a specific tax account? Add a payment source at the taxpayer level?

Schedule a Payment

Use this window to schedule a payment.

If you already have a default bank account set up for this tax account, that information is displayed in the bank account fields on this window.

- *If you want to pay with another bank account that is already saved to your profile, you can click the **Choose existing bank account** hyperlink.*
- *If you want to manually enter in new bank account information, click the **Manually enter bank information** hyperlink.*

Bank Account Type: Use the drop-down arrow to select the bank account type (*Checking or Savings*).

Routing Number: Enter in the bank routing (transit) number. (This is the first set of numbers shown at the bottom of your check.)

Account Number: Enter the bank account number. (This is the second set of numbers shown at the bottom of your check.)

Account Number Confirm: Re-enter your bank account number.

Save this Bank Information (check box): Select this check box if you are adding in new bank account information that you want to save to your profile.

Payment Date: Enter the date for which you want to schedule the payment.

Payment Amount: Enter the amount of the payment.

Password: You may be required to enter your password.

*After you have entered in all of the relevant payment information, click the **Submit** button in the menu bar on the left side of the window to schedule your payment.*

Related items: [Make a payment?] [Make multiple payments?] [View the status of a payment?] [Cancel a pending payment?] [Add a bank account for a specific tax account?]

Make Multiple Payments

You can make a single payment or multiple payments. The following steps describe how to *make multiple payments on multiple returns, periods, audits, etc*.

Click here to see the steps for making a payment on a single return, period, audit, etc.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**
- **Pay Multiple Accounts**

WHAT DO I DO?

10. After you click **Pay Multiple Accounts** in the menu bar on the left side of the window, the **Pay Multiple Accounts** window opens. Click the hyperlink in the **Add payment for tax** column to make a payment for that item.
11. The **Schedule a Payment** window opens.
    a. *If you already have bank account information on file*, the default bank account for the selected tax account is displayed.
        i. To choose another bank account on file, click **Choose existing bank account**.
        ii. To manually enter in new bank account information, click **New payment source**.
    b. *If you do not have bank account information on file*, enter in your bank account information.
12. Be sure to enter in the payment amount in the **Payment Amount** field.
13. Click **OK** to schedule the payment.
14. The **Pay Multiple Accounts** window is displayed again. If you click the **Payment Summary** tab, you can see a list of the payments you are scheduling.
15. After returning to the **My Accounts** tab, repeat steps 1 through 4 until all payments are scheduled.
16. Once all of the payments you want to make are listed in **Payment Summary** tab, click **Submit Payments**.
17. An authorization window opens requiring you to enter your password to authorize the payment transaction. Enter your password, then click **OK**.

18. A confirmation window shows you the details of your payment and your confirmation number. You can print the confirmation. Click **Okay** to close the confirmation window.
19. You can view your payment requests by clicking the **Requests** tab and then clicking the **Waiting to be Processed** sub-tab.

Related items: View the status of a payment? Make a payment? Cancel a pending payment? Add a payment source for a specific tax account? Add a payment source at the taxpayer level?

Payment Source

Use this window to add a payment source (i.e. bank account) to your tax account or update the details of an existing payment source.

Related items: Add a bank account to a specific tax account? Edit a bank account specific to a tax account? Delete a bank account for a specific tax account? Make a payment? Make multiple payments? View the status of a payment?

Add a Payment Source at the Taxpayer Level

You can add a payment source at the taxpayer level that can be used to pay debts on any of your tax accounts.

The following steps show how to add a payment source *at the taxpayer level*.

Click here to see instructions for adding a payment source *for a specific tax account*.

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. On the **My Bank Accounts** tab, click the **Advanced Payment Options** sub-tab.
2. Click **Add New**.
3. Complete the fields, as necessary.
4. Click **Save**.

Related items: Make a payment? Make multiple payments? Add a payment source for a specific tax account? Edit a payment source for a specific tax account? Delete a

payment source for a specific tax account? Edit a payment source at the taxpayer level? Delete a payment source at the taxpayer level?

Add a Payment Source for a Specific Tax Account

You can add a payment source for a specific tax account that can only be used to pay debt on the designated tax account.

The following steps show how to add a payment source for *a specific tax account*.

Click here to see instructions for adding a payment source *at the taxpayer level* (that can be used to pay on any of your tax accounts).

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. On the **My Bank Accounts** tab, verify that the **Account Payment Sources** sub-tab is selected. Locate the tax account that you want to set up a payment source for and click the **Setup** hyperlink for that tax account.
2. Complete the fields on this window.
3. Click **Save**.

Related items: Make a payment? Make multiple payments? Edit a payment source for a specific tax account? Delete a payment source for a specific tax account? Add a payment source at the taxpayer level? Edit a payment source at the taxpayer level? Delete a payment source at the taxpayer level?

Edit a Payment Source at the Taxpayer Level

You can designate a payment source at the taxpayer level that can be used to pay debts on any of your tax accounts.

The following steps show how to edit a bank account *at the taxpayer level*.

Click here to see instructions for editing a bank account *for a specific tax account*.

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. On the **My Bank Accounts** tab, click the **Advanced Payment Options** sub-tab.
2. Click the name hyperlink for the payment source you want to edit.
3. Click **Change**.
4. Edit the fields, as necessary.
5. Click **Save**.

Related items: Make a payment? Make multiple payments? Add a payment source for a specific tax account? Edit a payment source for a specific tax account? Delete a payment source for a specific tax account? Add a payment source at the taxpayer level? Delete a payment source at the taxpayer level?

Edit a Payment Source for a Specific Tax Account

You can designate a payment source for a specific tax account that can only be used to pay debt on the designated tax account.

The following steps show how to edit a payment source *for a specific tax account*.

Click here to see instructions for editing a payment source *at the taxpayer level* (that can be used to pay on any of your tax accounts).

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. On the **My Bank Accounts** tab, verify that the **Account Payment Sources** sub-tab is selected. Locate the tax account that you want to edit the payment source for and click the payment source name hyperlink in the **Payment Sources** column.

2. Click **Change**.
3. Complete the fields on this window.
4. Click **Save**.

Related items: Make a payment? Make multiple payments? Add a payment source for a specific tax account? Delete a payment source for a specific tax account? Add a payment source at the taxpayer level? Edit a payment source at the taxpayer level? Delete a payment source at the taxpayer level?

Delete a Payment Source at the Taxpayer Level

You can designate a payment source at the taxpayer level that can be used to pay debts on any of your tax accounts.

The following steps show how to delete a payment source *at the taxpayer level*.

Click here to see instructions for deleting a bank account *for a specific tax account*.

WHERE DO I START?

Depending on which window you are already on, you may need to click one or both of the following hyperlinks in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. On the **My Bank Accounts** tab, click the **Advanced Payment Options** sub-tab.
2. Click the name hyperlink for the bank account you want to delete.
3. Click **Delete**.
4. Click **Confirm**. The bank account information has been deleted.

Related items: Make a payment? Make multiple payments? Add a payment source for a specific tax account? Edit a payment source for a specific tax account? Delete a payment source for a specific tax account? Add a payment source at the taxpayer level? Edit a payment source at the taxpayer level?

Delete a Payment Source for a Specific Tax Account

You can designate a payment source for a specific tax account that can only be used to pay debt on the designated tax account.

The following steps show how to delete a payment source *for a specific tax account*.

[Click here](#) to see instructions for deleting a payment source *at the taxpayer level* (that can be used to pay on any of your tax accounts).

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**
- **Manage My Web Profile**

WHAT DO I DO?

1. On the **My Bank Accounts** tab, verify that the **Account Payment Sources** sub-tab is selected. Locate the tax account that you want to delete the payment source for and click the bank account name hyperlink in the **Payment Sources** column.
2. Click **Delete**.
3. Click **Confirm**.

Related items: Make a payment? Make multiple payments? Add a payment source for a specific tax account? Edit a payment source for a specific tax account? Add a payment source at the taxpayer level? Edit a payment source at the taxpayer level? Delete a payment source at the taxpayer level?

View the Status of a Payment

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account containing the payment whose status you want to view.
3. Click the **Request** tab to view the statuses of recent payments.
   Note: Any pending payments are listed in the **Waiting to be Processed** sub-tab under the **Requests** tab.

Related items: [Make a payment?] [Make multiple payments?] [Cancel a pending payment?] [Add a payment source for a specific tax account?] [Add a payment source at the taxpayer level?] [View the status of a return?]

Cancel a Pending Payment

If a payment request has not yet been processed, you can cancel the pending payment.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account for which you want to cancel a pending payment.
3. Click the **Requests** tab, then click the **Waiting to be Processed** tab.
4. Click the title hyperlink for the payment you want to cancel.
5. Click **Withdraw**.
6. Click **Confirm** to confirm that you do want to cancel the payment.

Related items: [View the status of a payment?] [Make a payment?] [Make multiple payments?] [Add a payment source for a specific tax account?] [Add a payment source at the taxpayer level?] [Withdraw a pending request?]

Information about filing returns

Select Filing Period

Use this window to select the filing period for which you wish to file a return.

By default, this list displays past and current periods. To view future periods in the list, click the **Show Future Periods** hyperlink.

Related items: [File a return?]

File a Return

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account you want to file a return for.
3. On the **Periods** tab, view the **Attention Needed** sub-tab.
4. Click the **File Now** hyperlink for the period on which you want to file a return. **Note:** If you need to file a return for a period not listed in the **Attention Needed** sub-tab, go to the menu bar on the left side of the window and click **File a Return**. Then click the filing period date hyperlink for the period on which you want to file a return. (You may view future periods by entering a future date in the **Show Future Periods Until** field and clicking the **Search** hyperlink.) You may need to click the hyperlink for the type of return you want to file.
5. Complete the appropriate fields as necessary.
    a. Field colors help you determine information about the field:
        i. Yellow fields are required
        ii. Green fields are editable
        iii. Red fields are in error; you must correct the value before you can save the return
    b. Note that for many returns, you may also see a list of forms or schedules across the top of the return. Click the form or schedule name to complete the information for that form or schedule. The information for the form or schedule is often transferred to a summary line on the main view of the return.
    c. If a line item name is displayed as a blue hyperlink, you can click that hyperlink to jump directly to the view or form that supports the figure in that field.
    d. To return to the main return view, click the left most tab at the top of the return.
    e. If any form or schedule contains a field in error (or requires a value), a red dot will appear next to the name of the schedule or form that is in error. You cannot save your changes if there are any forms or schedules in error. Click the form or schedule name to correct the error or complete the required value.

6. When you are satisfied with the return, you can proceed by performing any of the following:
    a. Click **Submit** to file the return. You will be required to re-enter your password and click **Yes** to submit the return. An information window will tell you that your return has been submitted and the return will post to your account after your request is processed. Buttons are available on this window to allow you to take further action or close the window.
    b. Click **Save and Finish Later** to save the changes you made, but not submit the return request. (This requires you to finish your changes at a later time and submit the changes in order for the return to be posted.) You will be required to confirm your action. A message is displayed confirming that your return has been saved. Click **OK**. To retrieve your return, click the **Requests** tab and then the **Started but not filed** sub-tab. The saved return will have a status of **In Progress**.
    c. Click **Cancel** to close this window without saving any of your changes.

Related items: View the details of an existing return? View the status of a return? Work with unfinished returns? Change an existing return? Print the details of an existing return? Troubleshoot printing a return? Withdraw a pending return request? Make a payment? Add access to another tax account?

Unfinished Returns

You may begin to complete a return and discover that you have to stop and finish later.

WHAT DO I DO?

To save a return to finish later

1. To save a return to finish later, just begin completing the return as usual. (Click here to view the standard instructions for filing a return.)
2. Once you have reached your stopping point, click **Save and Finish Later**.
3. You will be asked to confirm that you wish to save and finish later. Click **Yes**. The return will be saved with a status of **In Progress**.

   Note: At this point the return is not filed. You will need to revisit the return to complete and submit it.

To retrieve an unfinished return

1. To retrieve the unfinished return, click the **Requests** tab.
2. Click the **Started but not filed** sub-tab. The saved return will have a status of saved.

3. Click the hyperlink in the **Title** column for the return you want to finish.
4. Click **Change/Submit** to change the return details.
5. The fields in the window become editable. Make changes to the return, as necessary.
6. When you have completed the fields on the return and are ready to file, click **Submit** to file the return.
7. You will be required to re-enter your password and click **Yes** to submit the return.
8. An information window will tell you that your return has been submitted and the return will post to your account after your request is processed. You can use the buttons in the upper right corner of this window to take further action or close the window.

Related items: File a return? View the details of an existing return? View the status of a return? Change an existing return? Print the details of an existing return? Troubleshoot printing a return? Withdraw a pending return request? Make a payment? Add access to another tax account?

View the Status of a Return

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account for which you would like to view the status of a return.
3. Depending on whether the period still needs attention or is complete, you can:
    a. Click the **Attention Needed** sub-tab and look in the **Return Status** column;
    b. Click the **All Periods** sub-tab and search for the period whose return status you wish to view. Then look in the **Return Status** column.

   Note: To view the status of pending returns, click the **Requests** tab and then click the **Started but not filed** sub-tab.

Related items: File a return? View the details of an existing return? Work with unfinished returns? Change an existing return? Print the details of an existing return? Troubleshoot printing a return? Withdraw a pending return request? Make a payment? Add access to another tax account?

Change an Existing Return

Depending on the type of tax account, you may be able to change, or amend, a return after it is filed.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account containing the return whose details you would like to change.
3. Depending on whether the period still needs attention or is complete, you can:
    a. On the **Periods** tab, view the **Attention Needed** sub-tab and locate the return you want to change; or
    b. On the **Periods** tab, click the **All Periods** sub-tab and locate the return you want to change.
4. Click the **View/Amend** hyperlink for the return you wish to change. The return details are displayed.
5. Click **Amend** to change the return details. **Note:** If the return cannot be amended, **Amend** is not displayed.
6. The fields in the window become editable. Make changes to the return as necessary.
    a. Field colors help you determine information about the field:
        i. Yellow fields are required
        ii. Green fields are editable
        iii. Red fields are in error; you must correct the value before you can save the return
    b. Note that for many returns, you may also see a list of forms or schedules across the top of the return. Click the form or schedule name to complete the information for that form or schedule. The information for the form or schedule is often transferred to a summary line on the main view of the return.
    c. If a line item name is displayed as a blue hyperlink, you can click that hyperlink to jump directly to the form or schedule that supports the figure in that field.
    d. To return to the main return view, click the **left most** tab at the top of the return.

    e. If any form or schedule contains a field in error (or requires a value), a red dot will appear next to the name of the schedule or form that is in error. You cannot save your changes if there are any forms or schedules in error. Click the form or schedule name to correct the error or complete the required value.
7. After you have made your changes:
    a. Click Submit to amend your original return. (You will be required to re-enter your password to submit the return amendment.) An information window will tell you that your request has been submitted. Buttons are available on this window to allow you to take further action or close the window.
    b. Click **Save and Finish Later** to save the changes you made, but not submit the return request. (This requires you to finish your changes at a later time and submit the changes in order for the return to be posted.) You will be required to re-enter your password and confirm that you wish to save the changes without submitting the return. Click **OK**. To retrieve your return, click the **Requests** tab and then the **Started but not filed** sub-tab. The saved return with have a status of **In Progress**.
    c. Click **Cancel** to close this window without saving any of your changes.

Related items: File a return? View the details of an existing return? View the status of a return? Work with unfinished returns? Print the details of an existing return? Troubleshoot printing a return? Withdraw a pending return request? Make a payment? Add access to another tax account?

Withdraw a Pending Return Request

If a return request has not yet been processed, you can withdraw the pending request.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account containing the return you want to withdraw.
3. Click the **Requests** tab, then click the **Started but not filed** or **Waiting to be processed** sub-tab.

4. Click the hyperlink in the **Title** column for the return request you want to withdraw.
5. Click **Withdraw**.
6. Click **Confirm** to confirm that you do want to withdraw the request.

Related items: File a return? View the details of an existing return? View the status of a return? Work with unfinished returns? Change an existing return? Print the details of an existing return? Troubleshoot printing a return? Make a payment? Add access to another tax account?

Return List

This window shows you a list of submitted and expected returns.

- Click the **View/Amend** hyperlink to view the details of the return.
- Click the **File Now** hyperlink to file an expected return.

Related items: File a return? View the details of an existing return? View the status of a return?

Return Detail

This window shows you the details of the selected tax return.

- Click the **Change** button at the top of the window to make changes to the return.
- Click the **Print** button at the top of the window to print the return.

Related items: View the status of a return? File a return?

View the Details of an Existing Return

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account containing the return you want to view.
3. Depending on whether the period still needs attention or is complete, you can:

    a. On the **Periods** tab, view the **Attention Needed** sub-tab. Then click the **View/Amend** hyperlink for the return you wish to view; or
    b. On the **Periods** tab, click the **All Periods** sub-tab and search for the period whose details you wish to view. Then click the **View/Amend** hyperlink for the appropriate return.
4. The return details are displayed.

Related items: File a return? View the status of a return? Work with unfinished returns? Change an existing return? Print the details of an existing return? Troubleshoot printing a return? Withdraw a pending return request? Make a payment? Add access to another tax account?

Print the Details of an Existing Return

IMPORTANT: Printed copies of returns are only for your personal records and should **not** be sent to the agency.

WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

WHAT DO I DO?

1. On the **Accounts** tab, view the **My Accounts** sub-tab.
2. Click the account ID hyperlink for the account containing the return you want to print.
3. Depending on whether the period still needs attention or is complete, you can:
    a. On the **Periods** tab, view the **Attention Needed** sub-tab and locate the return you want to print; or
    b. On the **Periods** tab, click the **All Periods** sub-tab and locate the return you want to print.
4. Click the **View/Amend** hyperlink for the appropriate return.
5. Click **Print** to print the details of the return.

Related items: File a return? View the details of an existing return? View the status of a return? Work with unfinished returns? Change an existing return? Troubleshoot printing a return? Withdraw a pending return request? Make a payment? Add access to another tax account?

Troubleshoot Printing a Return

IMPORTANT: Printed copies of returns are only for your personal records and should not be sent to the agency.

If you are able to click **Print**, but are still unable to print returns, please check the following:

- Adobe Reader is installed on your computer. Click here to download the latest version of Adobe Reader.
- Pop-ups are enabled in your browser. Click here to learn more about enabling pop-ups.

Related items: File a return? View the details of an existing return? View the status of a return? Work with unfinished returns? Change an existing return? Print the details of an existing return? Withdraw a pending return request? Make a payment? Add access to another tax account?

Glossary

Action bar

The action bar is displayed on the top of many windows. It contains the back and forward buttons, action buttons, and the breadcrumb trail.

Action button

An action button performs a specific action when selected. You click an action button to perform an action or open a new window where you can complete the action. Some common action buttons include Submit, Save and Finish Later, Proceed to Payment, and Okay.

Breadcrumb trail

The breadcrumb trail shows you the full context of the window that you are currently viewing. The hyperlinks in the trail can be used to navigate to other windows.

Drop-down menu

A drop-down menu contains a list of preset items. To select an item in the list, click the down arrow at the right of the field, scroll down to the item you want, and click on it.

Hyperlink

A hyperlink is generally represented by blue text in a window or panel. Hyperlinks can also be found in the title bars of various panels. In these cases, the text is usually white. When you hover your mouse over any hyperlink text, it becomes underlined, further indicating that the text is a hyperlink. Clicking a hyperlink opens another window or allows you to perform some action.